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Membership-based fundraising within higher education : a strategic marketing management perspective

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MEMBERSHIP-BASED FUNDRAISING WITHIN HIGHER EDUCATION:
A STRATEGIC MARKETING MANAGEMENT PERSPECTIVE

A Thesis

Submitted to the Graduate Faculty of the
Louisiana State University and
Agricultural and Mechanical College
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requirements for the degree of
Master of Arts in the Liberal Arts

in

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by

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ABSTRACT

This thesis provides a comprehensive approach to launching a successful parent membership-based fundraising program, an exploration of best practices in the United States, and a complete development plan for parent fundraising for a large public university. The research discussed is applicable to many different organizations who wish to start a parent fundraising program, with the strongest relevance on parent fundraising within large public universities. This thesis is intended for an audience familiar with the intricacies of fundraising; however, primary, secondary, and other higher education markets may be strongly interested in the research discussed.

INTRODUCTION

Due to the instability of the nation's economy and budget cuts to public universities, many institutions have increased their development efforts or have been forced to establish external relations offices with the overall goal to increase private funding to support new and existing programs and initiatives. This paradigm shift illustrates the future of public higher education, as understanding the importance of higher education philanthropic fundraising will be vital to maintain core institutional values. As stated by the U.S. Department of Education, continued competition for precious resources in higher education, along with the simultaneous increasing expectations of higher education by parents, students, alumni, and other stakeholders, has forced institution administrators to look for significant alternatives for funding (Supiano, 2008; U.S. Department of Education, 2006).

According to Council for Aid to Education, charitable contributions to colleges and universities in the United States increased 2.3 percent in 2012. At \$31 billion, the total is still below 2008's historical high of \$31.6 billion. Adjusting for inflation, giving is virtually unchanged, inching up just 0.2 percent (Kaplan: 2013, 1). Parents are a huge stakeholder for universities. Research indicates in higher education conclude that parents are giving back to their son's or daughter's university because they believe in the mission of the organization and they believe in the values of the university even though a large percentage are not necessarily an alumnus. The previous statement reveals three distinct changes in this evolving paradigm: (1) parents are increasingly becoming more involved in their child's education; (2) parents' affinity to an institution exists because their child attends the university; and (3) parents instantly become potential stakeholders because of this new affinity. According to a recent

article in the Chronicle of Higher Education, while parents' donations still make up a small share of overall giving to colleges, they contributed some \$539 million last year, up more than 50 percent from 2001, according to the Council for Aid to Education (Quizon: 2011, 1).

The thesis discusses the history and research of philanthropy in higher education, with a specific interest in parent philanthropy, and explores the following two areas in detail: (1) research on existing parent fundraising best practices within large public universities, and (2) implementation of a comprehensive strategic membership-based parent fundraising and marketing plan for a large public university.

Membership-based parent and family organizations are on the rise within higher education. At least 500 colleges have started parent-giving programs, many just in the past decade, according to a 2009 survey by the University of Minnesota¹ (Savage, 1). Parents have been identified as natural prospective donors; however, two questions consistently surface: (1) Why would parents give back to an institution if they are already paying for tuition, books, room and board, and other fees; and (2) how would these privately-funded dollars impact the institution? More importantly, how do you shift parents' perceptions to show the value in making an additional donation?

Parents give a philanthropic gift for many different reasons, but the call to action is dependent upon the parent and family programs office and the parent development officer. It is essential for the university parent programs office and the development officer to understand what motivates parents to give. Parents feel more motivated to give when they are personally connected to the cause. The more links you can draw between a person's

¹ http://www1.umn.edu/prod/groups/ur/@pub/@ur/@parent/documents/content/ur_content_370591.pdf

motivations and what your organization offers, the more likely that person is to give (Bray: 2008, 98). Relationship building is vital because if the donation request comes from a development officer whom the funder personally knows and identifies with, then that parent is more likely to give.

Parents who donate are endorsing the university as it is now; not as it was when they were in college. With alumni, they're satisfied with an experience from perhaps 50 years ago. Parent donations are a pretty powerful endorsement (Quizon: 2011, 1). A parent's endorsement through a financial contribution in addition to existing costs is powerful. Many alumni who have the means to give are expected to give back to their alma mater but a non-alumnus parent's contribution shows how much that person believes in the mission of the institution. The challenge within parent membership-based fundraising is identifying donors who will give more than the transactional contribution and the benefits of a membership. Attempting to solve institutional obstacles by increasing private dollars raised, identifying effective parent fundraising practices, and producing a comprehensive parent fundraising plan are discussed in detail to encompass the big picture of parent fundraising.

SECTION 1.

THE BIG PICTURE OF PARENT FUNDRAISING AND THE FUNDAMENTALS OF HIGHER EDUCATION PHILANTHROPY

The Council for Advancement and Support of Education (CASE) is an international membership organization that provides knowledge, standards, advocacy, and training designed to strengthen the combined efforts of alumni relations, communications, fundraising, marketing and allied professionals (CASE website: 2013, 1). According to a 2013 CASE press release, predictions based on a Voluntary Support of Education (VSE) study predicts all university giving to grow from 5.5 percent in 2012 to 5.8 percent in 2013. "If the initial estimate for 2012 holds true, giving to higher education will have exceeded the high watermark set just prior to the recession," said CASE President John Lippincott. "This is very good news" (Russell: 2013, 1).

The potential for giving this year may exceed the previous all-time high record, which is good news to development officers, administrators, faculty, and economic trend forecasters. According to Figure 1², the left chart indicates that the rate of change in giving to education is predicted to jump a whole percentage point in value in private higher education institutions and nearly stay the same in public higher education institutions. However, as depicted in the right chart, the overall rate of change slightly increases in higher education by 0.3 percent. In the midst of the bigger picture, a small subset exists within higher education fundraising. Below, Figure 2³ shows the source of all contributions in the United States in 2011 to colleges and universities. As mentioned earlier in dollar amounts, parents gave nearly \$540 million to U.S. higher education institutions in 2010, up about 49 percent over the \$363 million

² http://www.case.org/Publications_and_Products/2011/NovemberDecember_2011/The_Family_and_Friends_Plan.html

³ http://www.cae.org/content/pdf/2011_VSE_pages_for_Web.pdf

contributed in 2001. Parents are a small subset within this large fundraising umbrella in higher education; however they are substantially increasing in financial contributions.

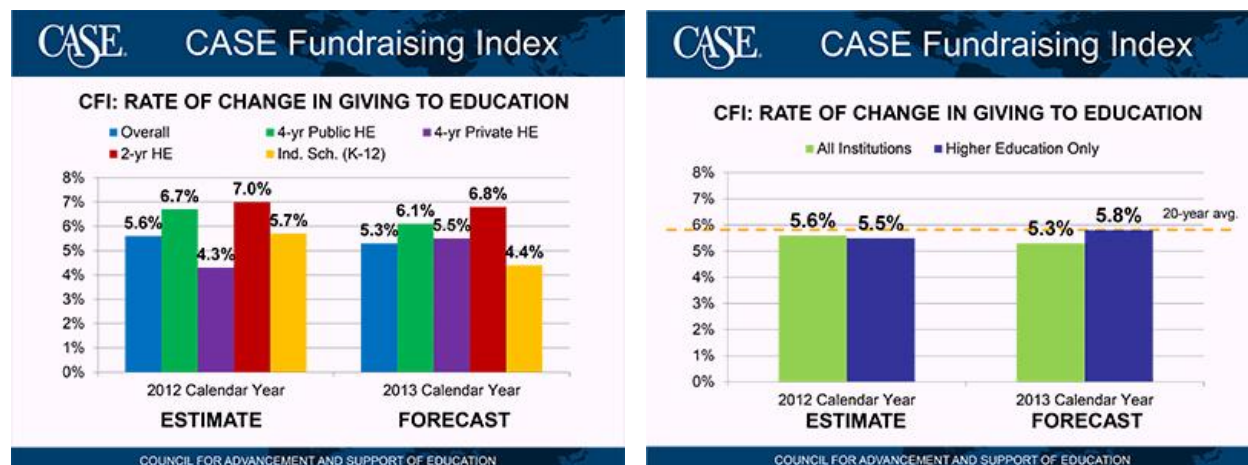
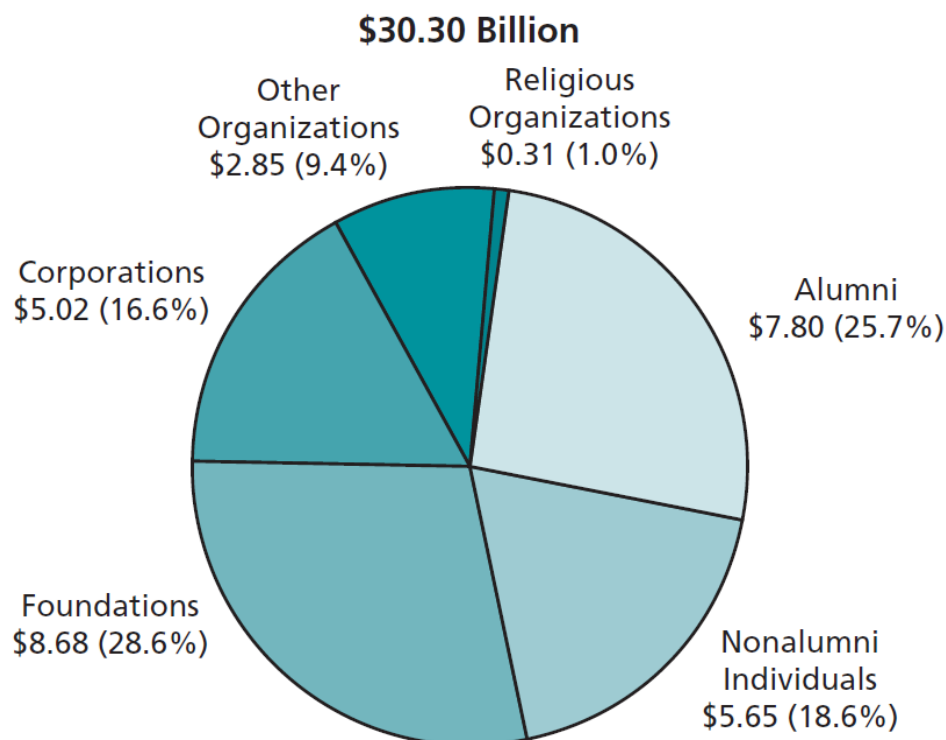


FIGURE 1: Council for Advancement and Support of Education Fundraising Index

University parent programs are growing significantly and along with it are coming huge fundraising opportunities. More than 500 U.S. colleges and universities have parent programs and some 82 percent of parent programs now actively fundraise compared to 44% in 2003 (Lum: 2011, 1). There is a variety of ways for parents to get involved, increase their impact, and excite them about parent giving, volunteering, and other university service opportunities. With regard to keeping parents engaged, the ultimate goal is to provide them with meaningful experiences so that they feel a part of their child's college experience and reciprocate that positive feeling to get parents to make contributions to the institution. Other benefits of parent experiences are positive word-of-mouth, increased student recruitment and retention rates, and the resultant creation of more public and private funding.

Voluntary Support of Higher Education by Source, 2011



Dollar amounts do not add to total and percentages do not add to 100 due to rounding.

FIGURE 2: Volunteer Support of Higher Education Overall Fundraising Contributions in USA

According to an article concerning parent philanthropy at the University of Florida, “although our primary constituency has been alumni, we believe the future lies in citizens who care deeply in things we do here,” says Tom Mitchell, Vice President for Development and Alumni Affairs at the University of Florida, which lost nearly \$200 million in state support in the past five years. Meanwhile, \$126 million from parents in the last six years made up 10 percent of philanthropic gifts to UF (Lum: 2011, 1). The value in parent relations has substantially increased, and as parents get involved with universities, the outcome is expected to increase continually.

Developing a Professional Development Office

In the January 2008 article of *The Chronicle of Higher Education*, the University of Wisconsin was said to have one of the smallest university development offices of any major public university, with just 51 fund raisers. However, even the Badgers' staff has grown by 24 percent in the past five years (Masterson: 2013, 3). Today, they have nearly tripled, having over 140 staff members at their foundation. Included among these staff members, two are dedicated specifically to parent fundraising. In 2000, these types of positions would not have existed. Most large public universities have recently discovered the value in parent relations. Building a professional parent and family programs development office can be challenging and take some time, but with the right resources can be vital in the long run.

According to Lock Haven (of Pennsylvania) University's 2008 strategic plan, the development office is a component of the University Advancement (UA) division, a cabinet-level division comprising the following functions: Fundraising (including Major gifts, Corporate & Foundation Relations, Planned Giving, and Annual Campaign); Alumni Relations; Public Relations; and Admissions (see Appendix A).

TABLE 1: University of Minnesota's National Study of Parent Programs Housing Units

Name of Office/Department	2003 Survey	2005 Survey	2007 Survey	2009 Survey
Academic Affairs	4.9 %	2.2 %	1.6 %	7.3 %
Advancement/Fundraising/Alumni	37.8 %	31.5 %	31.8 %	17.8 %
Enrollment Management	N/A	3.8 %	4.7 %	5.4 %
Institutional Relations	2.4 %	5.4 %	4.2 %	1.5 %
Student Affairs	52.4%	52.2 %	54.7%	61.4%
Other	2.4%	4.9 %	3.0 %	6.6%

Building a university professional development office can be extremely advantageous in successful parent fundraising at an institution and the lifeline to its success. According to Chart 1, most university parent fundraising programs are housed within a student affairs division or within the university's foundation office. According to the University of Minnesota's National Study of University Parent Programs, represented in the chart above⁴, the majority of parent units are housed within student affairs (Savage: 2011, 2). Since the trend of increasing parent fundraising continues to be on the rise, parent and family programs may depend on its development office to be the primary revenue source for the entire operation.

The University of Arizona parent programs unit, for example, is located within its student affairs division with one administrative staff person to assist in programmatic needs and one development director to assist with fundraising. The rest of the office's support is relies upon their foundation staff to assist them with their development needs; these foundation staff efforts are distributed university wide. An effective development office should be comprised of fundraisers, development officers, gift processors, an accountant, marketing and communications staff, and other necessary staff.

Fundraisers and development officers are a priority when beginning to build a professional development office within the parent programs office. The development officer's role includes all active fundraising avenues including direct mail campaigns, annual fundraising activities, sponsorships, event planning, and other donor development activities. Also the entire organization should be a part of its fundraising operations so the organization does not miss any potential development opportunities with their donors. The importance of building

⁴ http://www1.umn.edu/prod/groups/ur/@pub/@ur/@parent/documents/content/ur_content_370591.pdf

professional offices begins with establishing relationships within the organization, university, and advancement office. In establishing relationships with parents, it is important that parent engagement and parent boards are a top priority in the establishment of a professional development with the parent programs office.

University parent boards are an extension of the development office and should be comprised of representatives from the university's student body. Parent involvement in an advisory or fundraising board can be advantageous in multiple ways. According to a 2012 Forbes article, one board director states, "a non-profit board is looking after the governance of the organization and safeguarding its mission; as a board member I feel this responsibility even more keenly as it is even more critical in difficult economic times and where headlines are creating doubts in the minds of donors and stakeholders" (Bayrasli; 2011, 1). Board members are an extension of the development office and with their knowledge, support, and advice, are an integral part of the overall success. Soliciting in-kind donations is an excellent task for board members and other volunteers, especially for those who find asking for objects easier than asking for money (Bray: 2008, 68). An example of a university parent board's goals is included here:

Bradley University Parents' Board of Directors Goals

- Provide supplemental career resources for Bradley students and graduates
- Raise and direct funds for special student-oriented projects
- Identify and recognize outstanding student, faculty, and/or staff members
- Deliver assistance in support of recruitment and retention of Bradley students
- Enhance communication and collaboration among parents, administrators, and students

“We believe that through these ongoing efforts and the triad relationship amongst our students, ourselves, and the university administration, we can make a positive difference for Bradley students as they continue along their chosen academic and life path.”⁵

Parent advisory and fundraising boards are the key to important perspective information, a volunteer base, and fundraising dollars. Parent boards are an extension of the development office because they can support all of these important elements, especially when the office has a small staff. From a development officer’s point of view, to show that parent board members are already giving their precious time, it is even more valuable to show that they have given to the parent organization. It demonstrates their commitment to the cause and their confidence that the donation will be well spent (Bray: 2008, 14).

Establishing Budgets and Goals

Establishing budgets and goals is imperative so the development office can understand operating costs, evaluate and prioritize where funding is needed, and set annual funding goals. Every nonprofit should produce a budget (Bray 2008, 58). The development office needs to plan the budget, set programmatic goals, and review and revise these goals in order to maintain an effective balanced budget. Before the planning process begins, knowledge of the total estimated revenue from the previous fiscal year is necessary to effectively plan the operating budget and annual funding goals for the upcoming fiscal year. A budget worksheet may be the best resource for a development office (See Appendix A). All operating costs including salaries, facility costs, supplies, and other employee line item expenditures should be in the budget planning process. If possible, a person in the development office must coordinate the budgeting process. A parent committee or leader from the group and university administration

⁵ <http://www.bradley.edu/parentsboard>

should be formed to determine programmatic objectives and the cost of each program or initiative.

In establishing an effective budget, the total revenue should exceed the total expense. It is important to comprise a detailed organizational budget consisting of salaries, fringe benefits, and projected pay increases of all employees, as well as additional operational costs including telephone, printing, postage, supplies, equipment, insurance, and other costs. The fundraising plan is an integral part of the budgeting process and is sometimes referred to as the revenue budget. The revenue budget should obtain projected fundraising dollars based on new and improved parent fundraising methodologies and past giving history. Parent programs that have a membership-based donation comprise a large part of the operating budget. The income side of the organization's proposed annual budget should include known or projected income from reliable sources such as ongoing grants, new membership dues, and income that fundraising efforts will bring in (Bray: 2008, 62). Giving history analysis of the past three to five years is important to generate expected outcomes in the new fiscal year and planning for the allocation of funds in support of the organization's mission, program, and services. If the parent programs office does not have this kind of data, then one should work with the advancement services team to research and identify any data obtained within the past couple of years.

The spending plan, also known as the expenditure budget, has a direct impact on the parent programs office's execution of its mission. It is important to keep the parent leadership council or board of the budget annually, if not quarterly. The spending plan is important because it shows the development officer, the parent program office, and the development

officer exactly where donations are going and creates the opportunity to show meaningful allocations of donations. The spending plan should portray all items needed to supply the parent services and support needed, as well as any fundraising expenses. It costs money to make money. Campaign envelopes, development brochures, travel expenses, supplies, marketing materials, etc. all should have projected expenditures in the spending plan.

After establishing your budgetary goals, a fundraising plan can be developed and is one of the most important aspects in satisfying an organization's mission and objectives. Planning is crucial when developing an effective strategic fundraising program and involves a multi-step process. A fundraising goal needs to be set based on past giving history and new and existing fundraising methodologies within the organization. Involving parent board members is important in the fundraising plan process because development officers can use leverage in their decision making on what fundraising efforts need to take place. According to Chart 2, most universities that participated in the University of Minnesota Parent Programs Survey do not have a formal budget. Using a prepared budget, as discussed in the last segment, can help administrators and development officers seek gifts for certain initiatives, understand timelines, plan realistic goals, and steward incoming donations.

According to the National Survey of College Parent and Family Programs, nearly three fourths (71.1 percent) of respondents reported that their funding came from college/university allocation. Other funding sources included donations and gifts (19.9 percent), funds from events (18.5 percent), and parent/family memberships (7.6 percent). Less than 10 percent of respondents reported that the parent/family program at their institution required a membership fee from parents. This fee varied greatly by institution. Some charged a one-time

fee to cover four years, which ranged from \$50 to \$150, while others charged an annual fee ranging from \$10 to \$75.

TABLE 2: University of Minnesota's National Study of Parent Programs Operating Budget Amounts

Budget	Percentage
No Formal Budget	35
Less than \$10,000	13.2
\$10,001 - \$25,000	15.2
\$25,001 - \$50,000	14.7
\$50,001 - \$100,000	12.2
\$100,001 - \$250,000	7.1
Over \$250,000	2.5

Other institutions reported that most services were free, but a fee provided additional benefits or that parents were charged for certain events. However as seen in Table 2⁶, most universities have no formal budget, which from a business standpoint, is undesirable; a formal budget should be established to effectively run with effective metrics and goals in place. The next highest percentage in the chart shows that 15.2 percent of parent programs offices have a budget between \$10,001 and \$25,000. As time continues, one could predict that the percentages will grow and gravitate towards larger dollar amounts in operating budgets.

Developing a Fundraising Plan

University parent programs seek financial contributions through various ways including membership-based donations, annual giving, special events, individual and corporate donors, grants, and other bequests. It is important to relay the mission of the organization to all of the

⁶ http://www1.umn.edu/prod/groups/ur/@pub/@ur/@parent/documents/content/ur_content_370591.pdf

above entities, and match the donor's interest with available gift opportunities. An example of a university parent and family program's mission statement is:

University of California at San Diego Parent & Family Programs Mission Statement⁷:

Parent & Family Programs at UC San Diego engages family members as partners in the educational journey of their student. Parents are natural allies with the university as we seek to help students find success both academically and personally. Programs, events, and ongoing communication will encourage parents and family members to be involved in the university community, assist their student, and develop a long lasting connection to the university community.

Some proven fundraising methodologies to incorporate in the fundraising plan to accomplish the overall goal of the mission statement are effective organizational branding and messaging, solicit prospective donors, follow-up with good potential donors, and increase sustainability. Organizational branding and messaging is vital for the parent audience to be touched initially by the organization, leading to increasing exposure and awareness. Positive word-of-mouth and testimonials creates a sense of establishment and trust. The parent programs office is dependent on the success of the development officers to be able to provide services and programs based on the parent organization's mission.

Developing a parent fundraising plan for a large public university is a unique challenge. In order to maximize potential fundraising outcomes, targeting personalized communication about the mission to prospective donors and raising awareness through communication and events is very important to the fundraising success and must be included in the development stages of the fundraising plan. Increasing membership to a university parent organization is optimal to maintain a steady stream of revenue and targeted ways to increase membership should be showcased throughout the development plan. Examining future needs will allow the

⁷ <http://parents.ucsd.edu/about-us/mission.html>

development officer to determine which sources to contact for funding. The following guidelines and principles⁸ are essential when developing a fundraising plan:

Ethical Principles

Communications and marketing/fundraising professionals have a fundamental obligation to:

- Advance the mission of their institutions in an ethical and socially responsible manner.
- Reflect in their work the basic values of educational institutions, including an abiding respect for diverse viewpoints and a firm commitment to the open exchange of ideas.
- Reinforce through words and actions the principles of honesty, integrity, and trust, which form the basis for long-term, supportive relationships with the institution's publics.
- Place the welfare of the institution above personal gain, avoid conflicts of interest, take responsibility for their decisions, and treat colleagues and the public with courtesy and respect (CASE website).

Operational Principles

Communications and marketing/fundraising professionals are most successful at advancing their institutions when:

- Their efforts are carefully designed to support the institution's strategic plan, to manage its reputation, and to monitor those issues most likely to affect its future.
- They are present in the inner management circle, where they provide strategic and crisis counsel to the institution's leadership, convey the viewpoints of primary publics, and participate in the formulation of policies affecting those publics.
- They base their work on research that informs their understanding of the institution's primary publics and that measures progress toward established goals, expressed in terms of desired attitudes and behaviors among those publics.
- They undertake ongoing, targeted programs of communications and marketing, employing multiple channels appropriate to the audience and the message.
- They engage in two-way communication with primary publics and actively seek feedback to help the institution align its services with existing and emerging needs of its intended beneficiaries.
- They involve internal constituencies across the organization in delivering not only the messages but also the academic and service excellence on which the institution's reputation depends.
- They employ proven methods, as well as promising new approaches in the field, as part of a commitment to continuous improvement (CASE website).

8

http://www.case.org/Samples_Research_and_Tools/Principles_of_Practice/Principles_of_Practice_for_Communications_and_Marketing_Professionals_at_Educational_Institutions.html

Once the development officer has a plan to increase membership through various marketing strategies, it is important to have a good donor database. Top prospects and a quality database ensure a solid foundation for success. Managing a group of parents to fundraise and soliciting donors is a multi-faceted operation for both the development officer and the parent volunteers. Recruiting qualified volunteers to lead within the organization can cut costs and increase revenue. Many university parent leadership groups heavily rely on peers of current members, chairs and co-chairs, and friends of the university to be primary leaders.

Annual giving is a traditional source of revenue and usually consists of frequent donations. Overlapping of funding is crucial to the contribution of the parent programs and services because if one source of funding becomes unavailable or is not awarded, additional sources can be relied on to keep programs or services running while other areas are examined to cover the lost funding. Annual letters can be sent out to donors and the community as well as links provided on the non-profits website. Call campaigns can be set up through the development office to call every parent donor in the database.

Special event fundraising should also be incorporated into the fundraising plan. Most large state university parent programs have at least a family weekend incorporated into their programmatic plan. However, special events can be beneficial to a parent programs office by raising public awareness, raising money, focusing attention on university parent initiatives, and increasing affinity. Corporate sponsorships and individual donors could help off-set the costs of events because the ultimate goal of a fundraising special event is to increase revenue.

Sponsorships and grants can off-set event costs and thus produce profits for parent funds. By establishing relationships with restaurants and individual donors, elements such as food and service could be at no additional cost to the overall budget of the event. Cash sponsorships are also beneficial because the event planner can put the dollars where they are needed most. Overall sponsorships can be extremely advantageous to any parent organization and its events, and sometimes these sponsorships rely on a strategic partnership.

Corporate and foundation grants should be incorporated into the fundraising plan. Most large public universities have a corporate and foundations relations department that can assist in the strategic alliances for corporate sponsorships, family foundations, and other grant



FIGURE 3: Penn State's Giving Website

opportunities that align with the parent programs mission. Many companies offer matching gifts, where companies support their employee's philanthropic interests. For example, Pennsylvania State University⁹ has a search engine on their website to locate employers that match gifts. Identifying these prospective parent donors can sometime triple the outcome of a gift. As for grants, the funding is awarded for specific initiatives and should be incorporated in the fundraising plan.

Creating a diverse fundraising stream plan is important as it increases the rate of success. Having the support of membership donations as the main stream revenue source and concentrated fundraising efforts that include annual giving, special event fundraising, individual

⁹ <http://giveto.psu.edu/s/1218/index.aspx?sid=1218&gid=1&pgid=325>

giving, corporate sponsorship, matching gifts and grants are all useful with regards to the strategic fundraising plan. The ideal fundraising plan is to have a manageable mix of stable sources providing the bulk of your budget (i.e. parent membership donations), with some additional sources to provide balance, create future potential, and fill in the fundraising gaps (Bray: 2008, 77).

Identifying Strategic Partnerships

Identifying strategic partnerships can be very advantageous to the parent organization. Invaluable opportunities can be created between the parent organizations and other university or community business partnerships. Effective collaboration between both entities can be advantageous for the parent programs office and parent members by creating more meaningful experiences, increasing funding for the organization, and providing valuable access to resources for information and sponsorship opportunities through the university and companies. The ultimate strategic asset for a parent programs office is driven by the mission of the organization and generating positive community returns. On the other hand, other university offices are also trying to identify strategic alliances and businesses are driven by the need to increase profits and value for shareholders. An affective strategic partnership between the two entities happens when the organization's mission aligns with the business' profit motives.

University, community, and corporate partnerships are all beneficial to the parent programs office. University partnerships with the parent programs office include but are not limited to: the admissions/recruiting office, the alumni association, the athletic office/ticket office, residential life, and other programmatic offices on large state university campuses that can provide information and support through various partnerships. These partnerships, with

the right collaboration tactics, can be beneficial to the parent organization as well as the entire university through a variety of ways.

The admissions office collects data, hosts incoming student programs, and staffs the recruiters of the university. Each of these areas houses extremely valuable resources for a university parent program. The admissions office can provide incoming parent and student data, which can be used to market and raise awareness for the association. Importing the data provided from the admissions office into the university advancement system can help the development officer identify prospective donors. The development officer or a current parent can be included in attending admission programs to raise awareness and increase membership. For example, as discussed in the establishing budgets and goals section, a membership donation of \$100 and an incoming membership base of 1000 parents equal \$100,000, which is used as an operating budget. Any tactics available to increase membership also increases the operating budget. The university recruiters can also be a good resource in these efforts. Collaboration between the university admissions and parent programs offices provide unique benefits to each entity:

For the admissions office:

- More volunteers
- Increased exposure to potential recruits
- Reduces costs for regional programming

For the parents/family office:

- More volunteer opportunities
- Meaningful experiences
- Increased & early exposure

The alumni association is a great resource because alumni chapters are spread across the entire country. Where there are large numbers of alumni, there are large numbers of potential recruits for incoming students. Parent and alumni relations are very comparable. The

ultimate goal of an alumni association and a parent association is to deliver meaningful experiences and increase private funding. If the parent organization collaborates with alumni chapters throughout the nation, then both entities will increase their satisfaction rate because alumni and current parents can share experiences. Collaboration between alumni chapters and parent programs offices provide unique benefits to each entity:

For the alumni chapters:

- Increased exposure to grow membership
- Many alumni are parents
- Reduces costs for regional programming

For the parents/family office:

- More volunteer opportunities
- Meaningful experiences
- Increased exposure

There are many benefits to having a consistently winning athletics program. The parent programs office can tie many events to athletic events, cutting costs, saving time, and still providing a great university experience. Collaboration between the university athletics and parent programs offices provide unique benefits to each entity:

For the athletics office:

- Increased revenue
- Increased attendance

For the parents/family office:

- Discounted tickets
- Meaningful experience

Corporate partnerships will enhance the business' brand image in the community by association and this element is important to companies and in return will increase funding for parent programs and other initiatives. Company sponsors receive good publicity, a positive reputation as a good corporate citizen, as well as an opportunity to market their name to potential consumers in exchange for a cash or product sponsorship. Parent programs increases their funding to implement their programs, thereby creating a win-win partnership.

Overall, university partnerships are vital to the parent organization's success. Ideally, most of the university strategic partnerships will be linked between events and public relations. Increasing awareness through appropriate avenues will enhance both brands with the ultimate goal to increase revenue for both entities. Press releases about partnerships are advantageous to increase awareness about alliances. The partnerships discussed are just a few of the potential partnership opportunities that will enable the parent programs office to be very successful.

Identifying Individual and Corporate Donors

According to a GIVE USA executive summary report¹⁰ on philanthropy for 2011, "when you add together what is contributed to philanthropy through American households, bequests, and family foundations, that piece of the total \$298.42 billion estimated giving "pie" for 2011 comes to 88 percent" (Giving USA; 2012, 3). In 2011, giving by individuals increased 3.9 percent, and giving by bequest rose 12.2 percent. As reflected in the research, individuals and corporate donors are the lifeline to any parent programs office. Identifying these constituents is the challenge. University parent fundraising is unique as the development office usually has only four years to cultivate a relationship for a donation because as soon as their child graduates from the university the parent's affinity drops dramatically. A prospective alumni donor's affinity usually stays consistent, thus giving more time for a development officer to cultivate a relationship.

In order to identify donors, one must continually ask the question of what is the motivation behind a donor giving to a university parent organization. Identifying parent donors

¹⁰ Giving USA 2012 Annual Report on Philanthropy for the year of 2011.
<http://www.alysterling.com/documents/GUSA2012ExecutiveSummary.pdf>

who believe in the mission is a complex challenge but one can begin by seeking the donor who continually gives. Developing a parent donor profile can be extremely helpful in the identification process. Bray (2008) states that developing a profile is not much different from the market research that any business does to learn how and where to sell its product (Bray, 2008: 103). The object is to find out as much relevant information about your donors as possible, focusing on aspects of their background or lifestyle that might explain why they feel an affinity to your organization (Bray, 2008: 100).

An updated advancement database is the most important tool a development officer can have to identify top parent prospects. One benefit of having a membership-based donation is using their first donation as an entry-point to obtain all the information needed for the database. From this point, recruiting more parents increases parents in the database. After the advancement team establishes a donor database then it is time to identify top prospects.

There are many resources available to identify top individual prospects. Annual fund donors, wealth screening engines, active volunteers, student scholarship recipients, and parent board members all show qualifiers for being a good prospective donor. Establishing relationships with these donors is vital. In *the Art of Woo: Using Strategic Persuasion to Sell Your Ideas*, authors Shell and Moussa state that, “relationships give people a level of trust and confidence in each other, facilitating communication and making it easier to cooperate” (Shell & Moussa: 2007, 90). They suggest establishing rapport and reinforcing common interest builds the trust in a relationship. The more times the development officer can reach a parent the better chance one has to receive funding. One-on-one visits, calls, emails, and other

communication methods are important to keep the parent donor interested in giving to the organization.

Corporate donors are a major source of funding, even though they do not make up a large portion of the revenue funding of a university parent organization. Having a clear mission, vision, and established goals are important when establishing a relationship with a corporate donor. Most large state universities have a corporate and foundations relations person or office that can help identify good prospective corporate donors. Research is needed to identify companies' mission statements that match the goals of the parent programs office. Also, the parent board may have connections or established relationships within their company to sponsor certain initiatives or events.

In order to develop an effective corporate strategic partnership, the parent organization needs to research and review information on potential companies that align with their mission. Once the organization has developed a list of targeted companies with which to seek partnerships, the office can begin to research financial statements of similar non-profits in order to maximize a partnership opportunity. After this stage is complete, the parent programs office can begin to communicate through various media outlets such as direct mail, phone calls, emails, in-person visits, or all of the above to cultivate and establish the relationship.

Once a relationship is established, both parties will need to see demonstrated effort and results in order to sense each other's level of interest and commitment. Developing clear expectations, goals, and timeframes is important in building the continued partnership. If these expectations, goals, and timeframes are met, strong business and community partnerships can grow and have a positive impact on the parent program's overall success.

At the time of establishing the corporate partnership, a written agreement stating expectations and a first right of refusal for the existing sponsor is considered best practice in effective sponsorship. If the agreement is met and the company knows it is locked-in at a certain sponsorship level, the partnership can be cultivated and continue to grow. The partnership should enhance both brands, support the parent office's programs, and increase revenue for both entities.

SECTION 2.

BEST PRACTICES FOR UNIVERSITY PARENT PROGRAM AND MARKETING/FUNDRAISING

According to the Council of Advancement and Support of Education (CASE), current best practices of parent and family programs with regard to strategic marketing and fundraising include but are not limited to:

- Establish a brand and communicate regularly:
 - Include parents in magazine mailings
 - Establish an e-newsletter specifically for parents
 - Create a web page for the parent association and consider parent ambassador blogs and chat forums.
 - Establish a presence for a parents' association at orientation
- Special Events
 - Engage parents in fundraising opportunities; during Family Week
 - Plan special activities that give parents access to institutional leadership.
 - Regional Programming
 - I. Create opportunities for parents to volunteer as reception hosts, mentors of new college parents or regional representatives.
 - Invite parents of current and recently graduated students to campus events.
- Prospect Management, Outreach, and Volunteer Opportunities
 - Solid parent data and customer relationship management
 - Parent call-in program; Scripps College does a twice-a-year conference call that gives up to 50 parents the opportunity to connect with and ask questions of the college.
 - Have parents serve on an orientation parents panel

Each of these best practices will be examined in depth and the analysis will explore institutions that are also considered best in their field.

Establishing a Brand and Communication Plan

Branding is an important aspect in raising awareness around a university, and the challenge for a university lies between enabling sub brands within a university to resonate with its associated constituents. Branding is powerful because it understands and embraces human nature. Traditional marketing methods—including direct mail, telemarketing, print/television/radio advertising, and other earlier approaches—were used more frequently before the arrival of the digital revolution but are still used today in combination with more advanced methods. According to a 2010 Harvard Business Review article, *The One Thing You Must Get Right When Building a Brand*, both traditional marketing activities and brands themselves have become more relevant than ever before. Social media makes it more urgent that companies (or universities/non-profits for that matter) get the basics right, developing and reliably delivering on a compelling brand promise (Barwise & Meehan: 2010, 1).

Marketers have discovered that the most effective and efficient way to communicate value and build trust is through the process of branding. A brand gives a product or service a personality (Perry: 2008, 1). Brands have a profound impact on the behavior of people. The branding process simply makes sure that potential consumers know what they can count on from a company or product.

With regard to university parent fundraising, there are tangible benefits to brands or status when targeting individuals and companies for a gift. According to *The Real U: Building Brands That Resonate with Students, Faculty, Staff, and Donors*, you only have one chance to make a good first impression and in this media saturated, rapid decision-making that impression has to be strong, evocative, and on target if the development office is to keep the

doors open (Moore: 2010, 120). Every person, place, and thing is its own brand, especially with the digital revolution; social networks have enabled brand exposure more than ever before. Individuals and companies have the ability to create and sustain good reputations through social networking. The following outline portrays the benefit of tying giving to brands. Individuals, companies, or universities have their own reasoning for giving and the potential effects on its brand:

From an individual perspective:

- Tax deduction
- Higher status in the community/name recognition
- The good feeling it generates and belief in the cause or solving a problem
- Emotional impact in making a difference in a certain initiatives

From a company perspective:

- Exposure to the community – perhaps through a special event sponsorship
- Building brand loyalty
- Opportunities to put product in the hands of potential customers to increase revenue
- The positive public relations of the association with giving
- Corporate social responsibility has come to play a significant role in today's economy

From a parent programs/university perspective:

- Resonates transparency
- Benefits of support, products, and evaluates success on funds raised
- Ability to maximize exposure and cross promotion

The power of giving and its effect on these constituents' brands begin with a comprehensive communication plan. The importance of knowing how the parent audience



FIGURE 4: Market Segmentation model

communicates is important. The market segmentation model in Figure 4 examines the six steps to segment the parent audience, target the parent audience, and position the parent programs office with the right communication to capture the parent audience. Model 1, captured from Andereasen and Kotler (2008), shows a step-by-step plan for strategic marketing and communications. Developing market segments requires identifying the different bases for segmenting the market, developing profiles of the resulting market segments, and developing measures of each segment's attractiveness (Anderson & Kotler: 2008, 144). When developing a comprehensive communication plan, the importance in market segmentation is to confirm that the communication being developed is effective and appealing to the audience. Research shows that parents are using electronic communication more than ever before, which is low-cost and effective to the parent programs office.

In building an effective brand for the parent programs office, the admissions and orientation offices can produce opportunities to showcase the parent programs office. Admissions provide opportunities for the parent programs office to get in front of parents. The Orientation Office provides the opportunity to segment a population to grow the membership

base and make a good first impression. Any opportunity for parents to learn about the parent programs office is important and is potentially the first touch point with the entire university. Therefore, it is important to start off on the right foot.

In addition to increasing those touch points post-orientation, universities are changing the way they communicate in the digital world, evolving from more traditional marketing methods to more experimental marketing methods. Universities are more accessible now than ever before. Online parent chat rooms, replying to tweets via Twitter, and commenting on a university's Facebook page are just a few examples of how parents have direct access to university personnel.

Parent communication is essential to the success in making parents comfortable while their child is at a university and



FIGURE 5: Rutgers University Relations Social Media Page

getting the brand out there. Best practices for parent communication suggest using multiple social media outlets including Facebook, Twitter, YouTube, Wordpress, LinkedIn, and FlickrR. As you can see in Figure 5,¹¹ Rutgers University uses just about every type of social media outlet to connect with their constituents. Universities are more transparent than ever before because of the explosion of social media. Universities are capitalizing on the power of parents' word-of-mouth. Social media not only allow universities to facilitate transparency but also allow parents to communicate to each other and benefit university personnel to use this exchange to improve

¹¹ <http://ur.rutgers.edu/web-ecomunications/using-social-media>

existing practices. If parents want to contribute, they merely have to voice an opinion or question, and from a university perspective, this exchange generates credibility and affinity with the institution.

In Wahl's (2008) article *Flicker of the Wrist*, a company is likely to not only being on one or two social networking sites but an established presence on at least nine social networking sites. The article discusses how the company uses Facebook to invite a network of contacts to an event they host and how they use other social media sites to upload raw, unedited photos, live streaming video of an event, an integrated chat function, presentations posted on YouTube, and live micro-blogging through Twitter (Wahl: 2009, 1). The power of utilizing all social media outlets would be optimal and only increases brand and mission



FIGURE 6: Auburn University's Parent Programs Website

awareness but when dealing with limited staff and resources, a parents Facebook page would be considered priority at the top of the list.

Websites and electronic newsletters are another way to generate low-cost communication to parents and families. This type of communication keeps parents informed and engaged about university events, deadlines, necessary procedures, and other important information. As you can see in Figure 6,¹² Auburn University has compiled an effective parent-to-parent communication plan, including a great website full of resources, an electronic newsletter sign-

¹² <http://app.e2ma.net/app2/campaigns/archived/1354737/b9159e0584933a5ad98d5648a25b93fc/>

up page, and a giving page. The electronic newsletter also increases exposure by having parents forward to other parents and friends of the university. The average open rate of an electronic newsletter is 25 percent; however, the consistency in maintaining positive relations with the parents on a monthly basis is important. Every time you can touch a parent through some type of consistent communication, the more likely they are to resonate with your brand and give back.

Existing best practices involve establishing a brand, utilizing free or low-cost social media outlets, and having an electronic newsletter. Each of these elements is important to give parents the access to the university that they need and in return they become excited about giving back to the institution because of the valuable resources that the parent programs office has made available to them.

Special Events

Special parent events are important in creating the meaningful connection with the university. A common practice is a fall family weekend centered on food, fun, and an athletic event. Family weekends usually do not bring in large fundraising dollars, but rather create strong awareness and high satisfaction rates, which generates fundraising dollars in the long-run. Bray (2008) identifies events that do not bring in any actual profits can still be extremely valuable, particularly if they bring visibility to your organization, mobilize and expand its donor base, or highlight a particular issue of special importance to your members (Bray: 2008, 240).

Other best practices include regional programs, where programs are hosted in an area other than the host university's geographic location. The value in hosting regional events is that the constituents are traveling less to get to the location of an event, they get to meet with

other members living in the same region, and the event is usually low in cost. These types of opportunities also allow the development officer to identify people who want to be involved, perhaps have a high affinity with the university, and the opportunity to cultivate relationships.

Hosting smaller, targeted events with parent donors can also be beneficial in raising awareness and fundraising dollars. One of the benefits of a large public university is that there are existing events which the parent programs office can benefit from using, such as a concert, athletic, or theatric event. The parent programs office can host a pre-event reception and cater the event to fit the goals of what needs to be accomplished, while creating a good university experience for the participants.

The overarching goal of a special event is to create a unique experience, one that parents would not have had if they had not joined the parent organization; thus feeling privileged and wanting to contribute back to the cause for future parents to have similar experiences. The more positive experiences a parent has, the more likely they are to spread positive publicity through various communication outlets. Publicity for special events is key to ensure attendance for the event.

Prospect Management, Outreach, and Volunteer Opportunities

The last best practices element identified is prospect management, outreach, and volunteer opportunities. From a development office point-of-view, prospect management is the most important element one can have to fundraise effectively. It is where the development officer understands the human aspect of fundraising, finding the good prospective parent and eliminating the ones who are not interested in the mission. Parent information databases are the solution to contacting parents for involvement and solicitation purposes. From researching



FIGURE 7: Fundraising and Donor Development Funnel

the potential major donors to fund programs to finding good potential volunteers, it is important for the development officer to constantly process donors through the fundraising and donor development funnel¹³.

From the initial touch points with parents, the development officer consistently needs to push potential donors through this funnel to continually

support funds. The management of data and prospect information becomes the lifeblood of ensuring financial stability of an organization and must be maintained with the utmost care. Prospect management involves the identification, cultivation, and solicitation of individuals in hopes of generating and increasing revenue. To increase a parent's affinity, the development officer should get prospective donors to volunteer, take a leadership role, or attend events.

After prospects are identified, a profile should be created on each individual. The data gathered should include all contact information, occupation, marital status, family, and alumni information. Many university foundations have a research team that can help identify other key information for the development officer.

Parent outreach and volunteer opportunities increase affinity with the parent organization. According to the University of Virginia, parent engagement is fostering a unique and welcoming community for students and parents; the Parents Fund Supports UVA's Alumni

¹³ <http://www.imarketsmart.com/blog/category/email/>

and Parent Engagement efforts to enrich the student and parent experience (UVA website).¹⁴

The University of Virginia continues to explain its engagement opportunities, include incoming student send-off parties, international outreach, parent panels, and local engagement opportunities. All of these elements tie the parent to the university.

¹⁴ <http://uvaparents.virginia.edu/signature-partnerships-2>

SECTION 3.

STRATEGIC IMPLEMENTATION PLAN FOR PARENT FUNDRAISING AT LOUISIANA STATE UNIVERSITY

Introduction

The Louisiana State University (LSU) Family Association Strategic Plan was established on January 1, 2013 and will act as a guide for the future course of the organization over the next three years. This strategic plan outlines and explores new ways of thinking, with the ultimate goal of engaging LSU parents and families more than ever before. A key component of this strategic plan is for the LSU Family Association to hold its mission and values in mind at all times to effectively educate, engage, and excite our members through events, interactive communication, and committed support; overall, the key element is to create a top-tier university experience for LSU parents and their students.

This strategic fundraising plan discusses how the LSU Family Association brand will be well-recognized and perceived as a committed group of individuals and members who believe in its mission. It is a call to action to execute the mission by cultivating relationships and increasing fundraising efforts. The LSU Family Association aims to build stronger relationships with members, the LSU Community, and the city of Baton Rouge. The LSU Family Association will increase its outreach efforts by increasing a personal communication approach, hosting area and regional events, and employing other marketing efforts. This comprehensive fundraising plan will provide the goals and objectives of the LSU Family Association and is tied to the mission of the Division of Student Life & Enrollment¹⁵ at Louisiana State University.

¹⁵ <http://studentlife.lsu.edu/strategic-plans>

Below is the fundraising mission within the strategic plan of the Division of Student Life and Enrollment at LSU:

The Division of Student Life and Enrollment Strategic Fundraising Initiatives

Fundraising:

1. Raise external funds to optimize resources for programs and services.

Performance Indicators:

1. Annual Gifts: Dollars received from gifts, grants, and contract for non-capital projects
2. Gifts: Dollars received for capital projects

Strategies:

1. Develop a comprehensive fundraising plan.
2. Expand resources for scholarships.
3. Increase external fund streams for student life programs.
4. Actively seek external funding opportunities via grants or proposals.
5. Create a culture of giving for current students through development/fundraising awareness initiatives.

The division's plan provides the framework for a more effective, collaborative and synergetic approach to fundraising that creates meaningful engagement to produce multifaceted beneficiary outcomes for LSU. This plan also identifies the need to build holistic collaboration within the university and the value that private fundraising dollars brings to the entire university.

According to many of LSU's regional and national large public university competitors, the parent fundraising program at LSU is becoming more established. The University of Florida, according to their advancement services team, is one of the most successful large public university parent fundraising programs in the country, raising nearly 19 million in 2012 alone. In 2012, Auburn University began fundraising with parents and does not have a full-time parent development officer. LSU hopes to drive up fundraising revenue with the implementation of a

strategic fundraising implementation plan and to utilize new and existing resources to create transformational change.¹⁶

TABLE 3: Peer University Research on Structure of Parents and Parent Fundraising Amounts

	Fundraising Establishment		Membership Criteria				Fundraising Criteria	
	Parent Fund. Program Began	Full-Time Parent Dev. Officers	Member-ship Based?	New Members (in 2012)	Member-ship Fee (in 2012)	Member-ship Dollars Raised (in 2012)	Fundraising Dollars Raised (in 2012)	# of Major Gifts Raised (in 2012)
Univ. of Florida	~2005	1	NO	N/A	N/A	N/A	~\$19 million	50 (100K +)
Univ. of Michigan	~2009	1	NO	N/A	N/A	N/A	~\$15.3 million	36 (100K +)
Univ. of Alabama	~1993	1	NO*	N/A	N/A	N/A	~\$425 K	10 (10K +)
LSU	~2011	1	YES	~1500	\$100 for all 4 years	\$150000	~\$550 K	0 (25K)
Univ. of Arizona	~1986	1/2	NO*	750	2012 fee structure: \$65 1 yr, \$95 2 yr, \$125 3 yr, \$150 4 yr	\$65,000	~\$225 K	0 (25K)
Univ. of Mississippi	~2006	1	NO	N/A	N/A	N/A	~\$300 K	1 (25 K)
Auburn Univ.	~2012	0	NO	N/A	N/A	N/A	~\$150 K	0 (25 K)

¹⁶ Table 3 indicates information obtain directly through each program's development officer or university foundation. University of Michigan started out as a major gift transitioning down to annual gift; they have collaboration with all development across the board; 30 couples on their council gave major gifts. *Represents parent programs that were membership-based in the past but are no longer membership-based.

Organization of the LSU Family Association Fundraising Plan

The overall goal of the fundraising plan is to increase private dollars raised to maintain sustainability and support student-driven initiatives at Louisiana State University by establishing and implementing specific and measurable fundraising goals for a three year period, 2013-2016. Advancement through strategic partnerships, university collaboration, and parent leadership are all vital to this plan's success. The commitment to change according to implementing current best practices and setting the stage for our peer universities to look at us as one of the nation's leading large public university parent fundraising programs.

The fundraising plan encompasses every aspect of the mission statement, shown here in the LSU Family Association mission statement:

To provide opportunities for parents or guardians to become partners with the university in the educational experiences of their students, in the spirit of LSU!

- Lead families to university services and resources to continue to support their students.
- Support student success and help promote the university's goal to retain students through financial support of programs and scholarships made possible through development and fundraising efforts.
- Uphold the values of continued family involvement by planning programming to connect families to the university throughout the year.

Three core themes emerge from the LSU Family Association strategic plan:

1. The LSU Family Association will increase its general membership by approximately 10 percent each year. Estimates will fluctuate depending on incoming enrollment figures (See Appendix A). This increase will generate more revenue for the LSU Family Association operating budget at a membership donation of \$125.

TABLE 4: Statistical Analysis of Increasing Membership of LSU Family Association Each Year

	Number of Members	Percentage of Increase in members	Freshman Enrollment Numbers	Percent of Incoming class
2010	1346 members	N/A	5481	24.5%
2011	1197 members	-12%	5290	22.6%
2012	1476 members	23%	5725	25.8%

The brand of the LSU Family Association will increase its exposure by being present at on-campus recruiting events, sending brochures through university recruiters, attending student recruiting spring yield events, spring and summer orientation programs, hosting collaborative send-off parties with alumni chapters in large metro-area recruiting markets, sending a post card and follow-up email through the LSU Enrollment Management communication's office, and hosting the LSU Family Weekend (see Appendix B). All marketing materials such as banners, brochures, Family Association Council application, calendar, and thank you cards will have a collaborative logo and branding scheme. Starting earlier in the admissions process and exposing the LSU brand increases the familiarity with the association and likelihood of joining the LSU Family Association once on campus.

The LSU Family Association Council is a volunteer network created and supported by the LSU Office of Parent and Family Programs within the Division of Student Life & Enrollment. As representatives of all families of LSU students, council members will be knowledgeable about university activities and will assist in raising awareness for the LSU Family Association. Additionally, council members will be asked to provide guidance on their particular community's social and business culture and on effective ways to engage with other parents.

The LSU Family Association Council also needs to be increased, incorporating the incoming student data and having strategic representation from large recruiting markets with designated duties assigned to them such as the following:

Expectations of Council Members:

- Attend 2 annual council meetings; participate in conference calls when available.
- Serve a 2-year term; renewal contingent upon student's graduation
- Act as an ambassador for the University; stay informed about its activities and priorities.
- Recommend and assist in recruiting other volunteers.
- Serve as a host for the president, deans and other university leaders when requested.
- Be a resource for development officers to open doors to prospective donors and organizations.
- Assist the development staff with identifying, cultivating and, when requested, soliciting individuals for gifts. Make a case to others for supporting the university.
- Help identify issues that are especially important to parents of LSU students.
- Contribute to the parents/families' fundraising success by making a gift commitment.

Expectations of University Development Staff Members:

- Use the council's time carefully and productively.
- Respond promptly, appropriately and professionally to concerns, questions and inquiries.
- Respect the discreet and confidential information shared among council members.

Currently there are 16 members on the LSU Family Association Council. Ideally we would like a representative in the following markets based on recruitment numbers in the

following states (See Appendix B). Maintaining the current council’s membership and adding additional council members the following chart quantitatively shows figures for the next three years:

TABLE 5: Number of Additional New LSU Family Association Council Members Each Year

Areas	Number of LSU Family Association Council Members (Jan. 2013)	Number of additional new members projected per year:		
Louisiana		2013	2014	2015
Lafayette	3 council members	2	2	4
Baton Rouge	6 council members	2	4	6
Lake Charles	None	1	1	2
Shreveport	None	2	2	2
Texas				
Houston	2 council members	2	4	6
Dallas	1 council member	2	3	4
Austin	1 council member	1	2	3
Fort Worth	none	1	2	3
Other Recruiting Markets				
Atlanta, GA	None	2	4	6
Tennessee	None	1	3	3
Mississippi	None	1	2	3
Arkansas	2 council members	2	3	4
Florida	None	1	2	3
California	None	1	2	3
DC/Virginia	1 council member	1	3	5
TOTALS	16	22	39	57

2. The LSU Family Association will become more relevant in the lives of parents and students through targeted communication and programs that resonate with families.

Strategically host 3-4 annual special events and improve existing on-campus events to maximize profitability and increase revenue (see Appendix C). Outreach opportunities are both important to families and show that a large public university is interested in providing parents

with a unique experience in being able to meet other parents in their own city and state. As the LSU Family Association expands, the areas where the larger incoming student populations are coming from will be a priority for outreach efforts. Atlanta, Dallas, Houston, and others are potentially some of the largest out-of-state markets with high potential for fundraising efforts.

The collaboration between the LSU Alumni Association chapters and the LSU Family Association has produced the most successful student send-off parties to date. This continued collaboration exposes new incoming student and parents with the experience of current students and parents. The value is creating a comforting environment to new parents and students while meeting alumni, families, and friends in their area.

TABLE 6: Regional Special Events and Locations

Regional Special Event	Location
Austin Student Send Off Party	Austin, TX
Dallas Student Send Off Party	Dallas, TX
Fort Worth Student Send Off Party	Fort Worth, TX
Atlanta Student Send Off Party	Atlanta, GA
New Orleans Student Send Off Party	New Orleans, LA
Shreveport Student Send Off Party	Shreveport, LA
Dallas Cotton Classic Dinner	Dallas, TX
Atlanta LSU/UGA Dinner Reception	Atlanta, GA

3. The LSU Family Association will become a private fundraising-driven organization where volunteers are encouraged and empowered to support strategic initiatives established by the LSU Family Association professional staff and the LSU Family Association Council. The following fundraising and marketing goals are to be completed each year or at the end of the three-year strategic plan based on implementing the best practices discussed earlier:

Goal 1: A transformational increase in the number of parents and students actively participating in LSU Family Association events on an annual basis.

- Regional Programming
 - Create more opportunities for parents to volunteer as reception hosts, mentors of new college parents or regional representatives.
- On-Campus Events
 - Engage parents in fundraising opportunities; during Family Week
 - Plan special activities that give parents access to institutional leadership.
 - Invite parents of current and recently graduated students to campus events.

Goal 2: A transformational increase in the number of parents and students engaged in active communication with the LSU Family Association.

Key Metrics:

- Include parents in magazines
- Establish and evolve an interactive e-newsletter specifically for parents
 - Including surveys, photos, parent quotes, etc.
- Manage and evolve our existing web page for the LSU Family Association and chat forums
- Establish a presence for a parents' association at orientation
 - Increase membership and activity during orientation
- Increase average open rates of parent emails
- Increase parent website weekly hits

Goal 3: Increase benefits for LSU Family Association members.

- Provide a new incentives as part of the membership packet
 - Transformational benefits that include resources

Goal 4: An ambitious \$50,000 per year fundraising goal for LSU Family Association scholarship program and Student Life Emergency Support Fund while sustaining increased annual funding levels.

Key Metrics:

- Increase our Tiger Talk Scholarship Fundraising Campaign
 - By increasing exposure and informing parents about upcoming fundraising opportunities helps them to be more willing to give and support the cause
- Talk to potential donors through one-on-one visits about how scholarships and emergency support fund affect the students.

Goal 5: A more targeted effort for the development officer to increase major gift fundraising efforts.

- Strategic tactics with a concerted effort in collaboration with the LSU Foundation to target individuals with the capacity to give.
- Work with the Office of Admissions to receive data earlier and target individuals from prestigious high schools.
 - Targeted Development brochures and language to create a culture of giving for parents (see Appendix C).

Conclusion

The value in parent fundraising is evident. As mentioned earlier, parents gave nearly \$540 million to U.S. higher education institutions in 2010, up about 49 percent over the \$363 million contributed in 2001. There is a substantial interest in giving to parent programs, as it shows that parents are invested in not only their own children's success but the overall success of the institution. Institutions that are considered the "best in field" are University of Michigan and the University of Florida to name a few, generating a combined revenue of over 34 million dollars in 2012. An established parent programs office increases parent engagement and engaged parents give to the university.

Weaving multiple mission statements and fundraising priorities within higher education units is challenging. Supporting the university foundation's goals, division's objectives, and department's strategic initiatives are cumbersome and require careful strategic planning and interdepartmental collaboration. When developing the fundraising priorities, it is important to establish the fundamentals to launch an all-encompassing successful development plan. Developing a professional development office and parent board, establishing budgets and goals, developing a fundraising plan, identifying strategic partnerships, and identifying individual and corporate donors need to be established and sustained through a continual evaluation process.

Identifying best practices around the nation include establishing a brand and communication plan, having special events, and solidifying prospect management, outreach, and volunteer opportunities. These best practices take time in establishing but are necessary in creating a foundation for a parent fundraising program. Establishment of the brand and

communication plan can be extremely advantageous to the parent programs office, which includes important first impressions and word of mouth and is a strategic tool in increasing the overall membership of the organization. Having special events establishes a presence and increases affinity with the institution and parent program office. Creating other opportunities to increase affinity and identifying prospective donors is important in the establishment of a parent fundraising office and ultimately leads the way to increasing revenue. Once these best practices are in place, and a development officer is hired, developing the fundraising plan is the next important step in the process.

Organizing the fundraising plan is extremely important, as it will act as a blueprint for the future of the parent programs office for years to come. The overall goal of the fundraising plan is to increase private dollars raised to maintain sustainability and offer more student-driven initiatives across the division. Establishing goals and monitoring metrics can increase awareness of purpose-driven action and check marking achievements. Establishment and expansion of a parent fundraising program is a step-by-step process, requiring detailed outlines of how to accomplish the goals outlined.

Parents are key stakeholders for any institution. Whether it is engaging parents and having them spread positive word-of-mouth for the institution which leads to recruiting new students, increasing parent relations within a community, retaining existing students, or other positive outcomes; or it is identifying major donors that may be a game-changer in the advancement of the parent organization; all efforts and avenues of parent fundraising increase the overall perception and mission of the university. Parent fundraising is the ultimate strategic

advancement tool to excel the office of parent programs and transform the division of student life within any university.

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A1 Lock Haven University of Pennsylvania University Advancement Strategic Plan

Lock Haven University of Pennsylvania
University Advancement Division
Development Office

STRATEGIC PLAN SUMMARY

July 1, 2008

MISSION

The Development Office
builds a compelling case for choice and support of Lock Haven University (LHU)
among all of its constituents by communicating and advocating
for the university's distinctive position, role, and contributions,
thereby forging relationships and securing commitments
required to advance the institution's overarching mission and priorities.

VISION

Our vision is to be recognized for a pivotal leadership role in:

- Building an endowment that underwrites and ensures the success of the university's quest for excellence and distinction.
- Positioning LHU as steward of the region's future and human capital, worthy of regional business and industry support and collaboration
- Cultivating the university's most valuable and powerful strategic relationships among business, community, educational, cultural, and political leaders
- Planning and executing history-making, record-breaking annual, comprehensive and capital campaigns

VALUES

With a spirit of professionalism, and in an environment that encourages teamwork and personal growth, the Development Office commits to these values:

- ***Excellence*** — We take pride in our work and strive for the highest quality.
- ***Innovation*** — We empower ourselves and others to be risk-takers and reach beyond the current paradigm; we are open to change and creative new ideas in fulfilling our mission.
- ***Continuous Learning*** — We understand the principles and concepts underlying our work and take initiative to learn and inform others of "best practices" within our varied disciplines.
- ***Transparency and Accountability*** — As stewards of the public trust, we ensure that promises to our supporters are fulfilled and hold ourselves accountable for using our resources wisely.
- ***Ethical Action*** — We adhere to high ethical standards; we build relationships based on trust, honesty and integrity; and we respect privacy and confidentiality.

Context and Alignment with Lock Haven University's Strategic Plan

The Development Office is a component of the University Advancement (UA) division, a cabinet-level division comprising the following functions: Fundraising (including Major gifts, Corporate & Foundation Relations, Planned Giving, and Annual Campaign); Alumni Relations; Public Relations; and Admissions.

As a division, UA is responsible for leading and coordinating efforts to achieve Goal 8 of the University's Strategic Plan—Develop Additional External Resources: The University cultivates and develops new and existing donor prospects to achieve fundraising goals. The Development Office is primarily responsible for setting and achieving fundraising goals set under the University's strategic plan.

Primary Goals and Accountability

The Development Office's core objective is to build a compelling case for choice and support of LHU among friends, alumni, donors, prospective students and influencers, legislators, employers, voters and regional citizens. Thus, its activities revolve around creating and building relationships that provide support for the university in multiple ways, and the contextual activities and infrastructure required for building these strategic relationships. To this end, the Development Office has identified three primary goals:

- I. Serve as champion and steward of the university's future by building professional capacity, competence, and capabilities.
- II. Advance the university's mission, objectives, and interests by strategically cultivating, developing, and maintaining relationships with key constituents that lead to increased financial support of the university.
- III. Plan and implement campaigns and fundraising projects in support of the university.

Opportunities, Challenges, and Measures and Indicators of Success

The opportunities and challenges for each UA goal, together with suggested measures or indicators for achieving each goal follow:

I. Serve as champion and steward of the university's future by building professional capacity, competence, and capabilities.

A. Infrastructure & Tools for Effective Relationship Management — LHU stands to benefit immensely from its many valuable existing and potential connections and relationships, which together embody present and potential resources and support required to strengthen and transform the institution. To capitalize upon this potential and the extraordinary support opportunities they represent requires the professional infrastructure, systems, and capabilities

A1 (continued)

required to safeguard, manage, and make the most effective and strategic use of information regarding these relationships.

Measures and/or Indicators of Success:

- Increased efficiency and use of the LHU Foundation's database and fundraising tools.
- Conservation of fiscal resources through increased efficiency in mailing processes.

B. Professional Development — Fundraising and advancement professionals are constantly under pressure to achieve record successes each year. Through annual training and professional development at conferences and workshops, skills are constantly honed and new techniques are explored and implemented.

Measures and/or Indicators of Success:

- New fundraising and solicitation ideas are brought to the table each year.
- Each professional in the office attends at least one professional development conference or training event each year.

II. Advance the university's mission, objectives, and interests by strategically cultivating, developing, and maintaining relationships with key constituents that lead to increased financial support of the university.

Plans and Processes to Build Strategic Relationships — LHU's greatest potential for enhanced visibility and increased support hinges on its ability to engage in and deliver on the expectations of its constituents. To realize the benefits of the many strategic opportunities that exist, the university must develop stewardship plans and programs with the level of coherency, sophistication, and integration required to rationalize, prioritize, and most effectively capitalize upon its many high-potential relationships and opportunities.

Measures and/or Indicators of Success:

- Successfully raise \$2.75 million in total giving in fiscal year 2009, with specific goals of annual giving of at least \$160,000, athletic fundraising of \$ 215,000, and planned giving of \$250,000.
- Increase alumni participation rate to at least 17%.
- Increase number of donors by 5%.
- Achieve target number of one-on-one visits with past and prospective donors
- Achieve target number of development events and donors, with 25% of prospects attending events
- Achieve target for number of gifts of \$10,000+, size of average gifts of \$1,000 and less, and amount of overall giving (gifts and pledges)

III. Plan and implement campaigns and fundraising projects in support of the university.

Strategic Programs and Activities to Foster Affinity & Support — The most effective and powerful means of advancing the university's mission, objectives, and interests is by engaging in meaningful and strategic external connections, relationships, and initiatives, as well as by raising awareness internally about the importance and most effective means of identifying, fostering, building and sustaining such relationships.

Measures and/or Indicators of Success:

- Completion of feasibility study for a comprehensive fundraising campaign by February 1, 2009, including:
 - key fundraising priorities;
 - fundraising dollar and donor goals; and
 - budget and campaign plan

Last Reviewed: November 3, 2008

A2 Sample Budget Worksheet						
Obj. Code	Human Resources	11-12 Year	Budgeted	-	Actual	= New Balance
1000	Regular Employees					
1110	Programming/Orientation Person					
1110	Admin. Coordinator					
1110	Development Officer					
	Total					
	Student Pay (Supplimental Assistance)					
1240	Student Pay					
1240	Student Pay					
	Graduate Student					
1240	Student Pay					
	Total					
	Salary Total					
2000	Travel & Professional Dev.					
	Professional Development					
	Conferences					
	Travel Total	\$0				
3000	Operating Services					
	Sponsorship					
	Events					
	Membership Packets					
	Outreach					
	Marketing/Communication Expenses					
	Cell Phone					
	Additional Supplies					
	Other Charges					
	Expense TOTAL					



Trend Data: Students, Admissions and Entering

Degree-Seeking New Freshman, Transfer, and Graduate Application Statistics
Fall Semesters

	New Freshman*			New Transfer			New Graduate		
	Applied	Admitted	Enrolled	Applied	Admitted	Enrolled	Applied	Admitted	Enrolled
2012	16,169	12,326	5,725	2,483	1,384	825	4,884	1,834	1,034
2011	14,818	11,789	5,290	2,323	1,346	795	4,730	1,897	1,056
2010	18,214	13,148	5,481	2,297	1,442	854	4,783	2,118	1,143
2009	15,917	11,012	4,789	2,021	1,241	839	4,508	1,996	1,108
2008	15,093	11,092	5,141	1,971	1,205	815	4,000	1,808	1,089
2007***	11,452	8,332	4,596	1,648	939	647	3,629	1,586	966
2006	10,135	7,455	4,508	1,873	1,007	679	3,149	1,474	953
2005**	10,825	7,927	4,970	2,005	1,148	788	3,957	1,648	994
2004	11,077	8,660	5,700	1,831	1,074	788	4,123	1,708	1,068
2003	10,147	8,171	5,428	1,769	1,052	723	4,598	1,760	1,043
2002	10,376	7,973	5,262	2,021	1,234	879	4,198	1,741	1,000
2001	10,536	8,336	5,301	1,623	971	683	3,617	1,609	950
2000	9,789	7,588	5,087	2,115	1,458	1,042	4,023	1,614	926
1999	9,661	7,936	5,187	2,126	1,538	1,114	3,925	1,652	931
1998	9,752	7,934	5,083	2,445	1,805	1,322	3,857	1,734	984

Source: Admissions History File

Note: Freshman and Transfer statistics are for new undergraduate degree-seeking students only. Graduate statistics include new and re-entry students and exclude Veterinary Medicine.

*New freshman include fall and prior summer numbers.

**Fall 2005 data do not include visiting students from institutions affected by Hurricane Katrina.

***Beginning Fall 2007, admitted numbers include students who have withdrawn their applications.

File: appstats

Office of Budget and Planning

311 Thomas Boyd Hall | Baton Rouge, LA 70803

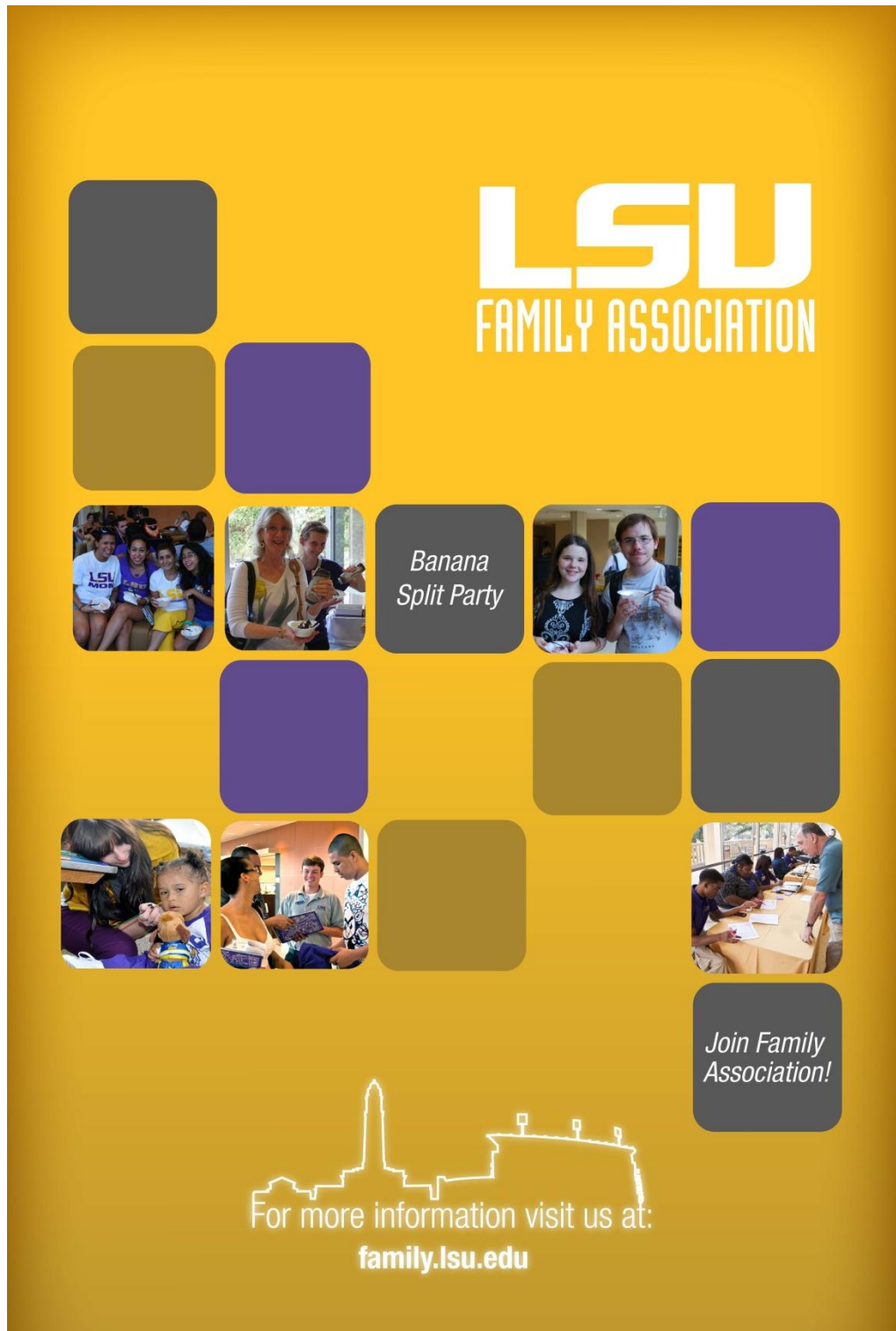
Telephone: 225-578-1231 Fax: 225-578-5963

E-mail: irlesa@lsu.edu

Updated: October 12, 2012

APPENDIX B

B1 LSU Family Association Banner



B2 LSU Family Association Brochure

LETTER FROM THE COUNCIL CHAIRS

Geaux Tigers! This will be—and may already have been, if you bleed purple and gold—the mantra of your child for the coming years he or she spends learning and maturing on LSU's campus. There is a Spirit that lives on this LSU campus—you feel it when you walk under the live oaks whose exposed roots students respectfully avoid; you feel it in the quad where students of diverse backgrounds gather under the sun of a Louisiana spring day to network between classes; you feel it on the Parade Ground where those same and many other students relax and play casual games of Frisbee, run their dogs, or just nap under the shadow of the Memorial Tower; and of course, you feel it under the lights of Tiger Stadium on Saturday nights in Death Valley!

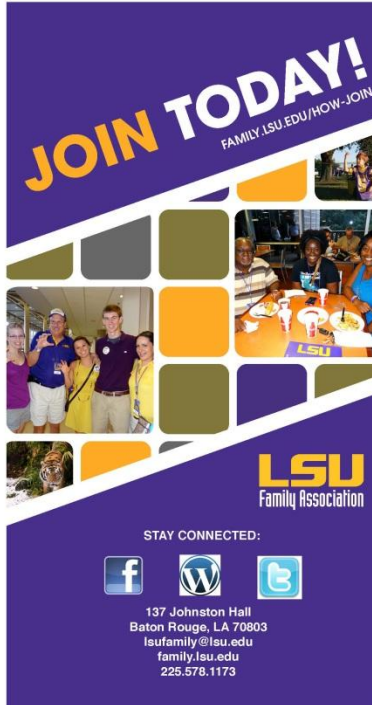
This Spirit that lives on the LSU campus is remarkable because it is the very fabric of your child's experience here. It is palpable because it is championed by faculty members passionate about the subjects they teach; administrators who champion the value of higher education in Louisiana; researchers who champion the growth of all aspects of the intellectual spectrum for the good of the individual, the state, the world, and beyond. These are the reasons why LSU is a winning university in the realm of academics and athletics—and your child is a part of weaving that fabric of success.

The LSU Family Association offers parents a valuable resource for staying connected to the world of our busy children through monthly email updates which include calendars of upcoming events; an accessible support system at the LSU Family Association office where friendly individuals are willing to assist at the other end of a phone or a personal email; an introduction to being the parent of a university student during Freshman Orientation; and most importantly, exclusive Family Association events each semester which allow you to share the Spirit of LSU campus, firsthand, at dinners, tailgate lunches, jazz brunches, and sporting events.

We hope you take advantage of being a part of the LSU Family Association as it offers valuable options for parents and families to maintain a level of involvement in the university setting.

Geaux Tigers!

Juan and Joanne Carrillo
Chairs, Family Association Council



JOIN TODAY!
FAMILY.LSU.EDU/HOW-JOIN

LSU
Family Association

STAY CONNECTED:

f W t

137 Johnston Hall
Baton Rouge, LA 70803
lsufamily@lsu.edu
family.lsu.edu
225.578.1173



WELCOME TO
THE LSU FAMILY ASSOCIATION
YOUR SOURCE FOR COMMUNICATION,
ENGAGEMENT, AND SUPPORT
FAMILY.LSU.EDU

LSU
Family Association



OUR MISSION

To provide opportunities for parents or guardians to become partners with the university in the educational experiences of their students, in the spirit of LSU!

Lead families to university services and resources to continue to support their students;

Support student success and help promote the university's goal to retain students through financial support of programs and scholarships made possible through development and fundraising efforts;

Uphold the values of continued family involvement.

“We live in Texas and the LSU Family Association has provided us with a great way to get connected to the university. Prior to our daughter choosing to go to school there, we had no ties to LSU—but we sure do now! The LSU Family Association provides a wealth of information about what is happening on campus and what resources are available to aid students as they progress toward their degree. We are pleased to be part of the Association and greatly appreciate the services it provides students and their families.”

Ken & Nancy Kral
LSU Parents from Houston, TX

MEMBER BENEFITS

COMMUNICATION

The Family Association is committed to providing you with information that is important to you and your student. Association members receive our Family Association Monthly E-mail Update packed with useful information for parents including upcoming events, registration deadlines, and more!

EVENTS

Family Association members receive priority registration for LSU Family Weekend in the fall. Members are also invited to exclusive Family Association events throughout the year, giving members access to opportunities on campus.

SCHOLARSHIPS

Students of Family Association members have the opportunity to apply for a Family Association Scholarship; only members of the Family Association are eligible to apply giving members additional resource for funding.

DISCOUNTS

Discounts are available for members at the LSU Bookstore, the Cook Hotel, LSU Dining locations and many more! For specific information on all LSU Family Association benefits visit family.lsu.edu/benefits.

GEAUX TIGERS!

—Mike the Tiger



FAMILY ASSOCIATION COUNCIL THE LEADERS OF YOUR ASSOCIATION

- 1. Leadership:** Provide leadership for the Family Association.
- 2. Liaison:** Serve as liaisons between members of the Family Association and LSU Parent & Family Programs; reflecting the views of Association members to the administration, and advocating the goals and plans of the Family Association to its members.
- 3. Programming Support:** Support for parent and family programs by giving feedback as needed and by serving as volunteers at events. Events may include Family Weekend and Family Orientation programs. Council members will also assist in recruiting efforts.
- 4. Fundraising Efforts:** Recognize and advocate that financial support of the Association is necessary to further its purpose and mission.

Membership on the Family Association Council is open to current Association members based on an application process. For more information on the LSU Family Association Council, go to family.lsu.edu/about-council.

B4 LSU Family Association Branded Thank You Card



B5 LSU Family Association Holiday Giving E-Card



Season's Greetings
From Our Tiger Family to Yours



LSU
Family Association

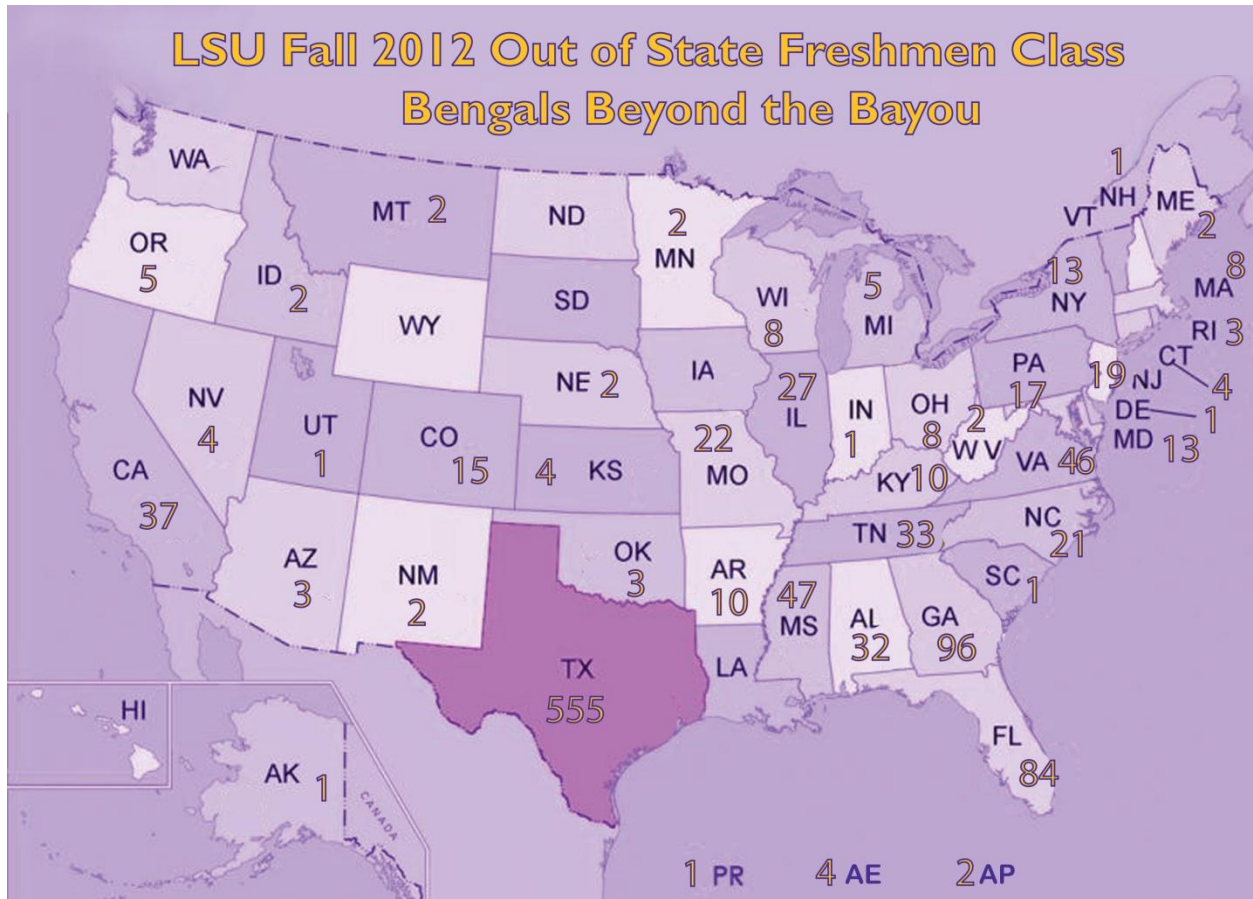


Give Back This Holiday Season

<p>Family Association General Fund</p> <p><i>Give to This Fund</i></p>	<p>Student Life Emergency Support Fund</p> <p><i>Give to This Fund</i></p>	<p>Family Association Scholarship Fund</p> <p><i>Give to This Fund</i></p>
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For more information about these giving opportunities visit, family.lsu.edu/giving

B6 Incoming Student Recruiting Markets Map



APPENDIX C

C1 LSU Family Association Stewardship Cards



*Thank you for attending the
Lafayette Family Association Pregame Tailgate!*

The LSU Family Association is dedicated to helping families year round through a variety of communication, support, and special events! Our next big event is Family Weekend, more details can be found at family.lsu.edu!

Family Weekend

October 25-27, 2013

Registration Opens for Family Association Members Tuesday, August 27

Events like these would not exist without your generous support. Please visit family.lsu.edu/giving for more information about our giving opportunities.

C2 Sample Sponsorship Verbiage with Companies and Levels for Events

Sample Sponsorship Verbiage with Companies

Overview

Position your company in front of thousands of enthusiastic LSU Parents and Families... be a part of the excitement and align your business with the LSU Family Association! Several hallmark events are scheduled during the next 12 months that will highlight our sponsors and which provide unique opportunities for you to reach our family and student audience.

Company Recognition

Family events are marketed to a general or targeted list of parents and students from a constituency of over 6000 members. Marketing includes links or listings in the monthly e-newsletter going to over 6000 opt-in families, friends, and fans, electronic invitations (2 per event), sponsorship recognition on the Family Association web sites, sponsorship recognition on event pages, registration pages and all direct mail associated with individual events. The LSU Family Association web site receives over XXX unique visitors per month. From athletic events to family crawfish boils, from jazz brunches to scholarship programs, there are a wide range of opportunities for sponsorship that provide access to specific groups.

We invite you to join us as a sponsor and gain high visibility with our family and student audience. For more information on sponsoring Parent & Family programs and events, please contact:

Josh Garland

Assistant Director of Development,
LSU Family Association
132 Johnston Hall
Baton Rouge, LA 70803

jgarla1@lsu.edu | 225.287.1563 C | 225.578.0311 O | 225.578.4820 F



Sponsorship Levels

for the

LSU Family Spring Event

March 9, 2013

LIVE GOLD TITLE SPONSOR \$1000

- Donor recognition as presenting Sponsor pre and post event publicity
- First right of refusal in subsequent years as Presenting Sponsor
- Company logo in all event advertisements
- Logo placement on LSU Family Association website and other social media accounts
- Listing on all sponsor boards and flyers distributed throughout the event
- Individual sponsorship banner at Family Association spring event
- Access to Family Association spring event
- Admission to LSU baseball game

LOVE PURPLE PATRON SPONSOR \$500

- Company logo in all event advertisements
- Logo placement on LSU Family Association website and other social media accounts
- Listing on all sponsor boards and flyers distributed throughout the event
- Access to Family Association spring event

TIGER SPIRIT FAN SPONSOR \$250

- Company logo in all event advertisements
- Logo placement on LSU Family Association website
- Listing on all sponsor boards and flyers distributed throughout the event

(Donations can be Monetary or Product - expecting nearly 100 LSU Families)

LSU Family Association | 137 Johnston Hall | 225.578.0311 | lsufamily@lsu.edu

VITA

Joshua P. Garland was born in McAllen, TX, to Eric and Rene Garland. He was raised in Memphis, TN and moved to Lafayette, LA in 2000 where he graduated from St. Thomas More Catholic High School in 2004. He received a Bachelor of Science degree, majoring in psychology, in 2008, from Louisiana State University.

From 2009-2011, Mr. Garland served as a recruiter for the Office of Undergraduate Admissions & Student Aid, where he developed a passion for university student life and working with students, parents, families, and alumni. In 2011, he assumed the role of Coordinator of Corporate Relations and Alumni within the LSU Department of Geology & Geophysics. As of 2012, he was offered a position within the LSU Foundation as the Assistant Director of Development for the LSU Family Association.

Mr. Garland is a member of many national professional organizations, including Student Affairs Administrators in Higher Education, Association of Fundraising Professionals, and Council for Advancement and Support of Education. He also is a local community supporter and serves as the staff advisor St. Jude Children's Hospital Up Til Dawn Collegiate Program, enjoys being an active St. George Catholic Church member, and spends his spare time with his wife, traveling, and watching collegiate sports.